

# Prepare a Competitive Sealed Bid from a Sourcing Project: Combined Two-Step



This Quick Reference Guide contains information about how to issue, evaluate, and award sealed bids using the Combined Two-step Invitation for Bids (IFB) approach.

**Why use a Combined 2-Step IFB?** The Combined 2-step IFB is a type of solicitation that allows responses to be reviewed in two distinct steps:

1. **Technical Proposal Evaluation:** The buyer evaluates the technical proposals and eliminates any that do not fully meet the requirements before reviewing pricing.
2. **Pricing Proposal Evaluation:** The buyer evaluates the pricing information (for supplier proposals that fully meet the technical requirements) and makes an award.

The Buyer issues only a single solicitation and suppliers have to respond only once. The review process described above eliminates the need to use multiple solicitations and suppliers having to respond multiple times.

## Issuing the Solicitation – Key Notes

The standard process for issuing a solicitation in eVA can be followed with the following noted exceptions:

- Choose **Competitive Sealed Combined Two Step** as the **Project Type**
- Choose **2 Step IFB (2STP)** as the Opportunity Type (on the **Prepare RFx** tab)
- Complete the **Technical Questions** tab (on the **Prepare RFx** tab)
- **Line Item(s) are required** – Add line items (on **Items F** tab)

## Evaluating & Awarding – Key Notes

The standard process for evaluation and award of solicitation can be followed with the following noted exceptions:

- Paper responses should be entered, reviewed, and evaluated after the bid closes and before reviewing electronic responses
- Technical Proposals must be reviewed prior to pricing information becoming available for review

If you need information or training on how to create, manage, evaluate, and award procurements in eVA, click [here](#).

# Issuing a Competitive Sealed Combined Two Step

1. Choose *Competitive Sealed Combined Two-Step* as the **Project Type** and follow the standard process for completing the project, team members, documents, and suppliers steps.

The screenshot shows the 'Create Sourcing Project' interface. At the top, there's a navigation bar with tabs: Suppliers, Sourcing, Contracts, Shop, Procurement, Analytics, Admin, Config, Integration, Manage, and Report Center. Below the navigation bar, there's a search bar and a 'Create Sourcing Project' button. The main form area is titled 'General Information'. It contains several fields: 'Code', 'Label\*' (with a 'Save as a template' checkbox), 'Project Type\*' (a dropdown menu), 'Status\*' (a dropdown menu), 'Project Start Date\*' (a date picker), and 'Converted Solicitation Reference #'. The 'Project Type\*' dropdown is open, showing options: 'Small Purchase', 'Competitive Sealed Combined Two Step' (highlighted with an orange box and the number '1'), 'Competitive Sealed Bid/Proposal', and 'Notice Only'. There is also a 'See All' link. The 'Status\*' dropdown is set to 'In progress'.

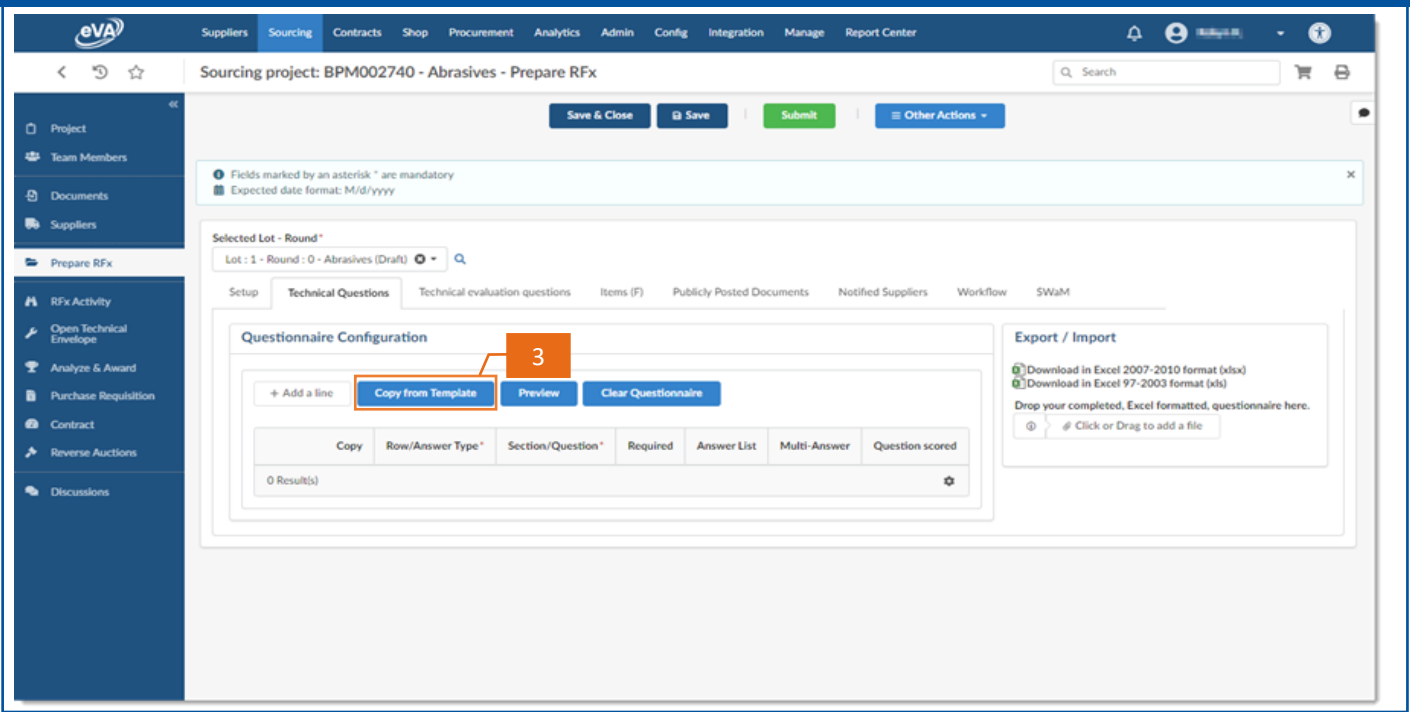
2. Complete the **Setup Tab** on the **Prepare RFx** step, following the standard process for completing the information on the **Setup Tab**. Note that the **RFx Type** defaults to *Combined Two Step*.

Once you choose save, in addition to the standard tabs, you will see the following two new tabs:

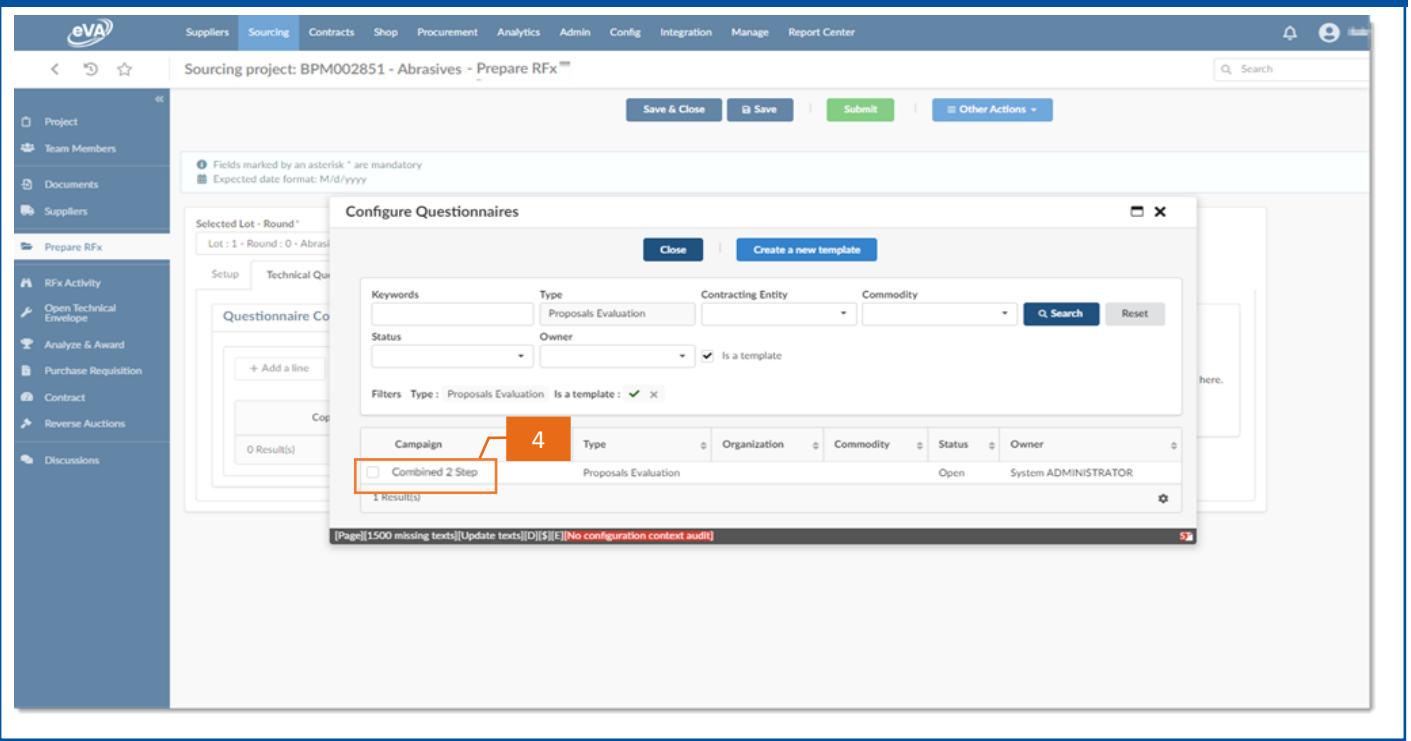
- *Technical Questions* tab: This allows you to define the technical information you would like back from the supplier. The following pages will show you how.
- *Technical evaluation questions* tab: This tab is not used at this time. Please ignore.

The Technical Questions are created by the buyer to be completed by the suppliers. This is where you can request information; the supplier responses and technical attachment(s) make up the technical proposal. For ease, a template has been created for your use to standardize the process.

3. From **Technical Questions** tab, select **Copy from Template**.



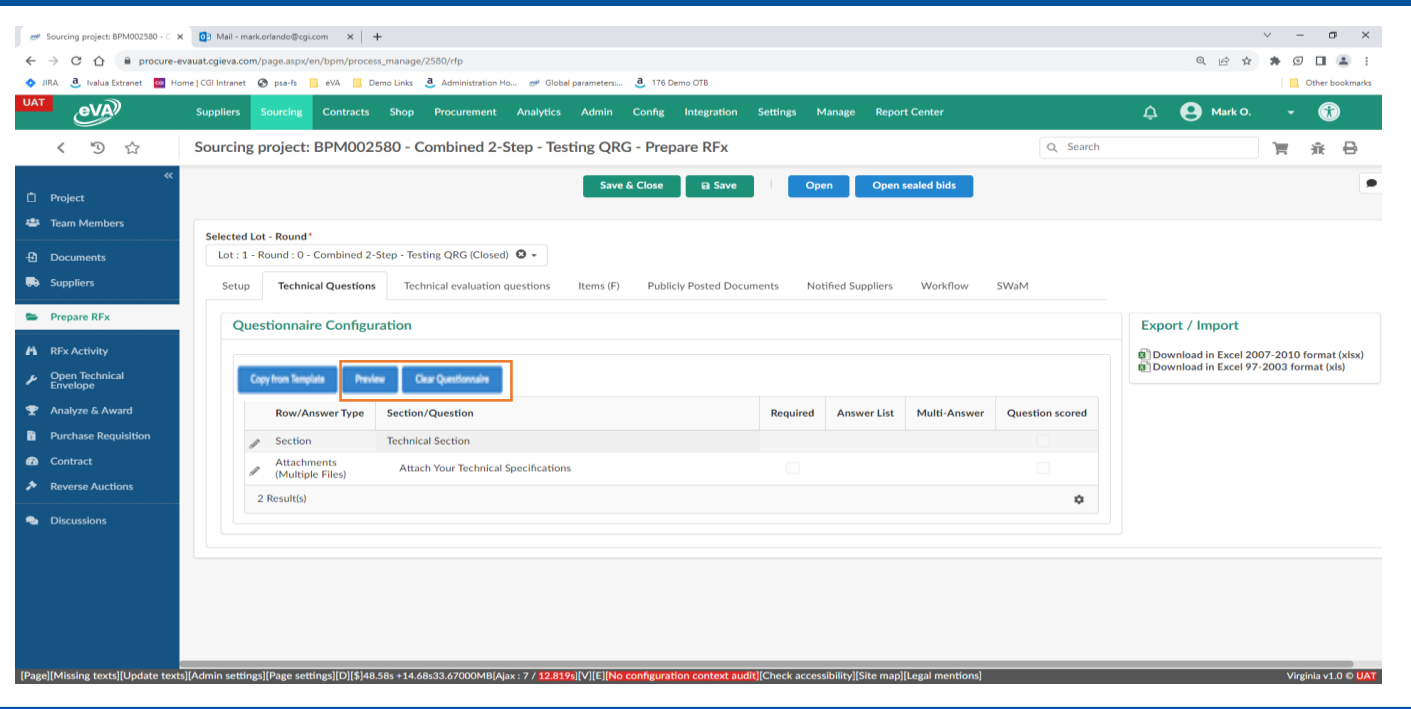
4. Choose the **Combined 2 Step** template (by selecting the checkbox next to the template name).



5. Review the questions added from template.

The **Preview** button can be used to view the questions as the supplier will see them.

The **Clear Questionnaire** button can be used to clear out all the questions if needed.



6. Use the standard process to add your line items(on the **Items (F)** tab) and documents (on the **Publicly Posted Documents** tab).

**IMPORTANT NOTES:**

- **You are required to add at least one line item.** The system will not let the solicitation publish without a line item. These line items are what the supplier responds to for the pricing evaluation step.
- If you have attached a document to the **Documents** tab and would like for it to publish publicly along with the solicitation, please make sure you have added it to the **Publicly Posted Documents** tab.

7. Use the standard process to submit and publish the solicitation.

# How to Enter a Paper Response for a Combined 2-Step

When the bid period has expired, you can begin your review of paper responses. Open the paper Technical envelope for the bid and determine whether the technical requirements have been met.

If the technical requirements have been met:

1. Go to the **RFx Activity** tab and select the **+ sign** corresponding to the company whose bid you are reviewing.
2. Enter the technical response.
3. Open the paper Pricing envelope.
4. Go to **Items (F)** tab and enter the item pricing information.

If the technical requirements have **not** been met:

1. Go to the **RFx Activity** tab and select the **+ sign** corresponding to the company whose bid you are reviewing.
2. Enter the technical response.
3. DO NOT OPEN the paper Pricing envelope.
4. Go to Items (F) tab and enter 0.00 for item prices.

The screenshot displays the eVA Sourcing project interface for Lot 1 - Abrasives - Round 0. The interface includes a sidebar with navigation options such as Project, Team Members, Documents, Suppliers, Prepare RFx, RFx Activity, Open Technical Envelope, Analyze & Award, Purchase Requisition, Contract, Reverse Auctions, and Discussions. The main content area shows a table of suppliers with columns for Name, Email, Logins, Last login (UTC-4), Proposals, Declined, Status, Comment, and Paper Response. The first row, Wayne Enterprises, Inc., is highlighted with an orange box and a red '1' in a blue square, indicating the '+ sign' to click for entering a paper response.

Name	Email	Logins	Last login (UTC-4)	Proposals	Declined	Status	Comment	Paper Response
Wayne Enterprises, Inc.				0	+			
L & C Distribution Warehouse				0	+			
Home Office Co. Inc.				0	+			
Domestic Manufacturing Inc.				0	+			
Travel International Co.				0	+			
Inter-Market				0	+			
Bimix				0	+			
GL HW Material Co.				0	+			
Govind HW Supplies Co.				0	+			

# How to Review Submitted Proposals

Follow the steps below after the bids have been unsealed.

1. From the Open Technical Envelope tab, click the link in the **Proposal** column for the first proposal to open it.

eVA

SuppliersSourcingContractsShopProcurementAnalyticsAdminConfigIntegrationManageReport Center

Search

Shopping Cart

Help

Project

Team Members

Documents

Suppliers

Prepare RFx

RFx Activity

Open Technical Envelope

Analyze & Award

Purchase Requisition

Contract

Reverse Auctions

Discussions

Sourcing project: BPM002983 - Abrasives - Open Technical Envelope

Save & Close

Save

Close Envelope

Selected Round\*

Lot : 1 - Round : 0 - Abrasives (Proposals Available)

List of proposals

RFx Evaluations

Requests

Status

Abrasives 0

Submitted

Reset

Search

0 Selected

Download selected proposals

Prepare Questionnaire Responses

Suppliers	Supplier Status	Proposal	Documents	Questionnaire Progress	Submitted (UTC-4)	Score	Acknowledged	Actions
Wayne Enterprises, Inc.	Active Supplier	<a href="#">Proposal # 1</a>	1	18%	<input type="checkbox"/>	8/23/2023 6:53:33 PM	1.25000	<div>Accept Proposal</div> <div>Reject proposal</div>
Bruce's Stuff	Active Supplier	<a href="#">Proposal # 1</a>	1	18%	<input type="checkbox"/>	8/23/2023 6:18:39 PM	1.25000	<div>Accept Proposal</div> <div>Reject proposal</div>

2 Result(s)

Review the technical questionnaire. Suppliers have the ability to add a technical document as an attachment, so remember to check for attachments on the **Response Information)** tab.

2. When you have finished the review, select **Close** to return to the Technical Envelope.

- When you return to the **Technical Envelope**, accept or reject the proposal using the appropriate button in the **Actions** column. Continue to review and accept or reject each proposal.

Sourcing project: BPM002983 - Abrasives - Open Technical Envelope

Save & Close Save Close Envelope

Selected Round\*  
Lot : 1 - Round : 0 - Abrasives (Proposals Available)

List of proposals RFx Evaluations

Requests: Abrasives 0 Status: Submitted

Suppliers	Supplier Status	Proposal	Documents	Questionnaire Progress	Submitted (UTC-4)	Score	Acknowledged	Actions
Wayne Enterprises, Inc.	Active Supplier	Proposal # 1	1	18%	8/23/2023 6:53:33 PM	1.25000		Accept Proposal Reject proposal
Bruce's Stuff	Active Supplier	Proposal # 1	1	18%	8/23/2023 6:18:39 PM	1.25000		Accept Proposal Reject proposal

2 Result(s)

Note that you can make changes to the **Actions** selected for each proposal.

- When you have finalized your choices, select **Save**.
- Select **Close Envelope** after all proposals have been reviewed.

Sourcing project: BPM002983 - Abrasives - Open Technical Envelope

Save & Close Save Close Envelope

Selected Round\*  
Lot : 1 - Round : 0 - Abrasives (Proposals Available)

List of proposals RFx Evaluations

Requests: Abrasives 0 Status: Submitted

Suppliers	Supplier Status	Proposal	Documents	Questionnaire Progress	Submitted (UTC-4)	Score	Acknowledged	Actions
Wayne Enterprises, Inc.	Active Supplier	Proposal # 1	1	18%	8/23/2023 6:53:33 PM	1.25000		Proposal Accepted Cancel
Bruce's Stuff	Active Supplier	Proposal # 1	1	18%	8/23/2023 6:18:39 PM	1.25000		Proposal Declined Cancel

2 Result(s)

- Go to the **Analyze & Award** tab. Any proposals that you accepted in the Technical Envelope will be shown here.

Follow the standard process to analyze pricing information and to make your award decision.